

**FINAL REPORT
COLORADO LEGAL SERVICES
EFFICIENCIES WORKING GROUP**

Efficiencies Working Group Members: David Bye, A. Frank Gallegos, Co-Chairs, Candace Sparks, Diana Barber, Ellen Helberg, Lou Venero, Rene Rosechild, Sandra Cheowa MoKine, Terry Lopez-Guzman, and Vince Gratton

GOALS/OBJECTIVES

In its initial meeting, the Working Group adopted as its goal:

Improve the services we provide, the processes we use to provide those services, and the culture we work in by maximizing the overall effectiveness and productivity of Colorado Legal Services. This includes improving case handling and case management, and staff capabilities by sharing staff experience and expertise through learning from one another, as well as by efficient use of program and technology resources.

SUMMARY OF WORK

The Working Group sought to identify specific activities to improve case management efficiencies program wide. We focused on standardizing a part of the intake process by reviewing and recommending changes to the “Eligibility Application” (Intake Sheet), the Retainer Agreement, and the written statement of Client’s Rights and Responsibilities, keeping in mind differences among offices in staffing patterns and types of cases handled. Our efforts resulted in the attached documents.

There is still significant work to be done in the areas of intake and initial client interviews, and beyond. The Working Group discussed the need for more standardized problem identification questionnaires and pleadings, particularly in family law, public benefits and housing.

Finally, several members voiced a concern that due to the demands on our limited staffing, we often fail to devote enough time to improve the quality of our own skills, work environment, and professional development. We believe that staff should be supported and encouraged to set aside enough time for activities which are necessary for high quality legal work, e.g. adequate documentation of work, developing computer skills, etc. This concept should be an important value of this organization, to which it should give more than lip service.

The Working Group recognized that CLS is fortunate to have committed staff and significant resources to provide each office with improved hardware, software, and advice on their use. The Working Group recognizes that technology offers many more possibilities with which we can continue to improve the organization’s overall effectiveness.

There remain many other activities which require further investigation, such as integrating the Kemp’s program’s capabilities with other case handling activities (e.g. co-

counseling, timekeeping, calendaring, letter writing), using the Internet to expand our services, using our in-house technology for staff training, and improving our technological capabilities overall.

Rene Rosechild, of the Denver office, recommended that this Working Group research and document those activities that each office believes it does especially efficiently. We would then share this information with all CLS offices so that all could take advantage of the most efficient and effective procedures. Discussion focused mainly on defining the best means of gathering and transferring the information, whether through statewide training, regional training, or individual training. A subcommittee decided that the most cost effective method would be to use regional training groups. Ms. Rosechild will continue her efforts to identify office expertise and will suggest a format for training.

RECOMMENDATIONS

CLS should establish a standing committee whose purpose is to propose and help implement policies, systems, methods, etc. designed to make the program more efficient and effective. This committee should be made up of representatives from all job categories. We also strongly request that senior management endorse the concept of such a Working committee and agree to seriously and promptly consider the committee's recommendations.

CLS should continue the process of establishing uniform program documents in the areas of case handling and staff administrative services (e.g. leave requests forms, time sheets forms, etc.)

CLS should take even greater advantage of technology. For example, the Working Group strongly recommends that CLS commit adequate resources to design a system that uses the Kemp's program to generate appropriate letters and pleadings. The Working Group supports the implementation of Kemp's on the CLS Wide Area Network to coordinate case handling among the offices (statewide conflicts checks, referring cases, co-counseling, etc.)

CLS should use technology to improve staff training in substantive legal areas as well as to train staff to use computers, the Internet, etc. Mr. Bye foresees the day when most of the intake process begins at a single entry point; the Working Group supports that concept and encourages CLS to move towards that goal.

The subcommittee experimented with WebX, an Internet document sharing program, to finalize the Retainer Agreement and Client's Rights and Responsibilities form. The subcommittee recommends further exploration of this format for document drafting, editing, and sharing.

To support and explore using the CLS website to expand services to clients and facilitate sharing information expertise, and documents among staff.

NEXT STEPS

The Working Group's overall conclusion is that ORGANIZATIONAL EFFICIENCY IS A JOURNEY, NOT A DESTINATION. The Working Group recognizes that significant effort must be expended, and that we have only scratched the surface of the work we must accomplish on our journey toward sustained efficiency. Therefore, the Working Group looks forward to an ongoing committee, as mentioned above, to assist with this journey.